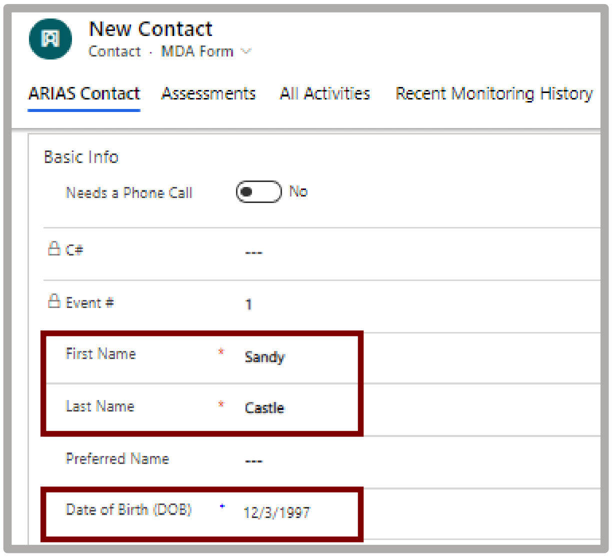
CCTO Micro-Training

Entering A Contact: 6 Steps

Fields with * are required to create your contact.
Fields with + are required by the state to track data.

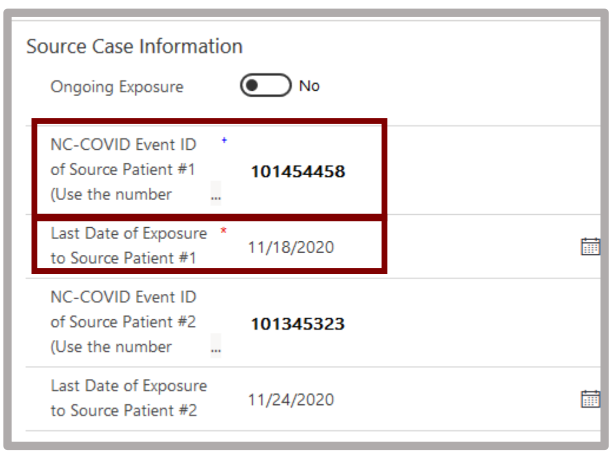
Click Contacts at the left of the screen and then **select** + New at the top.



#1: Basic Info

- First Name*
- Last Name*
- Date of Birth+ *(necessary for digital outreach)*

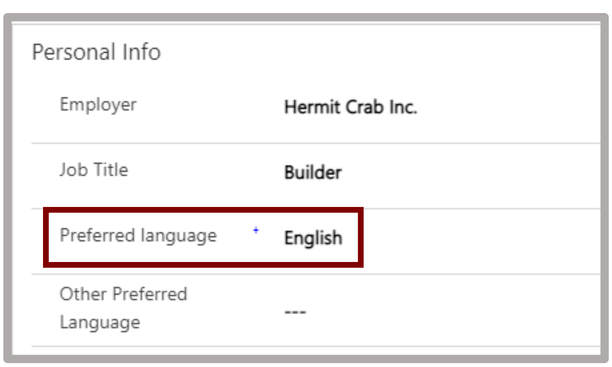
The **Needs a Phone Call** button allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.**



#2: Source Case Information

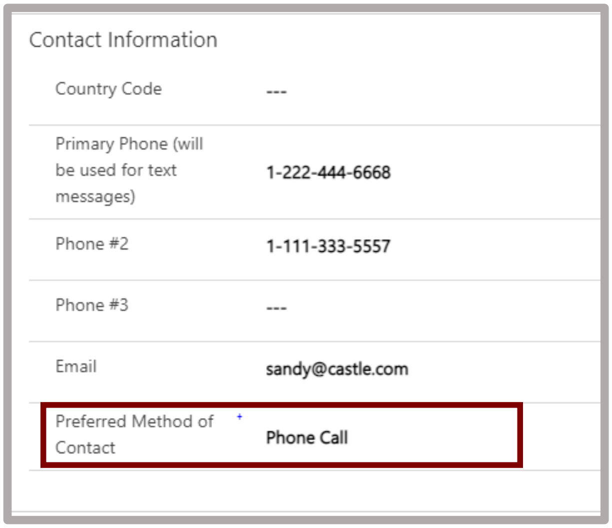
- Ongoing Exposure *(if, for example, your contact lives with a case patient)*
- NC-COVID Event ID+
- Last Date of Exposure*

If you do not have an NC-COVID Event ID, include Source Patient Name and Birthdate.



#3: Personal Info

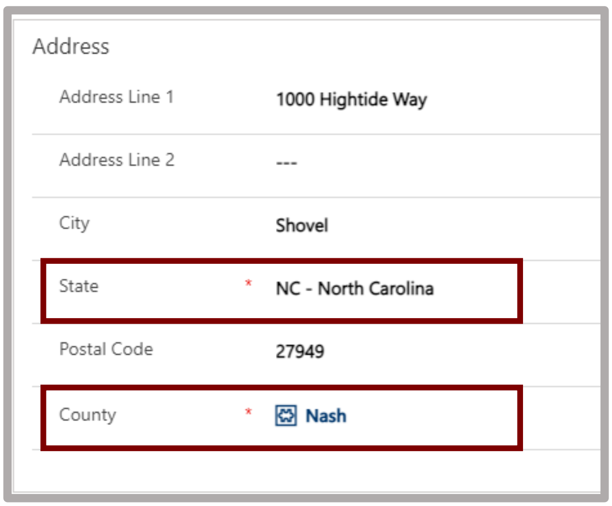
- Employer *(if known)*
- Preferred Language+



#4: Contact Information

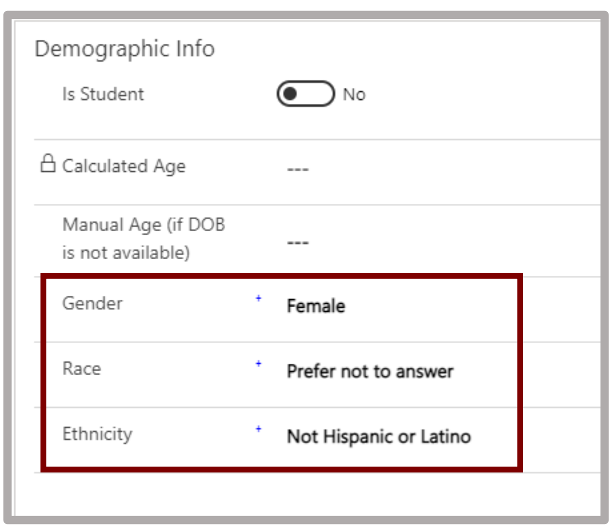
- Primary Phone *(no country code or dashes needed – this number will be used for automated text outreach if applicable)*
- Email
- Preferred Method of Contact+

If you set Preferred Method of Contact to "Text Message" or "Email," a Primary Phone number or Email will become required.



#5: Address

- Address Line 1 *(street address)*
- City
- State*
- Postal Code
- County* *(use county of case if not known)*



#6: Demographic Information

- Is Student *(if known)*
- Manual Age *(if no DOB)*
- Gender+
- Race+
- Ethnicity+

Save your work Save to finish. If needed, you can then **use "Assign"** Assign at the top of the screen and single-click "Me" to input a "User or Team" and assign this contact to them. **You're all done!**